REDCap User Manual - Add New Users to REDCap

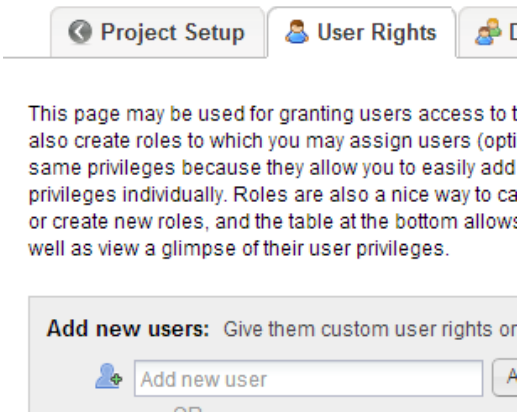
In REDCap two different methods are utilised to create users for the project. Users with University of Melbourne email IDs can be added with their domain username, however other users need to be added using their personal email addresses. Step by step instructions to add users using one of the two methods are given below:

1. Users with University of Melbourne domain email address
2. Users without University of Melbourne domain email address

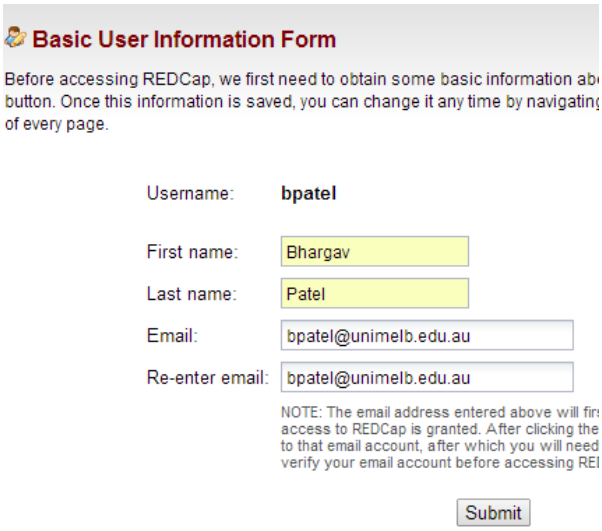
Users with University of Melbourne domain email address

Follow the below steps in sequence.

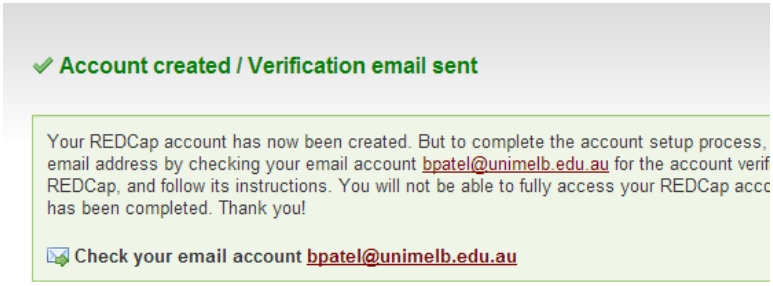
1. Collect University of Melbourne domain names for each user to be added in REDCap.
2. If the user need to be in a project before login, go to My Projects > User Rights
    a. Add usernames (University of Melbourne domain name) to the project and assign appropriate permissions (DO NOT include @unimelb.edu.au)


Project Setup
User Rights
This page may be used for granting users access to t
also create roles to which you may assign users (opti
same privileges because they allow you to easily add
privileges individually. Roles are also a nice way to ca
or create new roles, and the table at the bottom allows
well as view a glimpse of their user privileges.
Add new users: Give them custom user rights or
Add new user

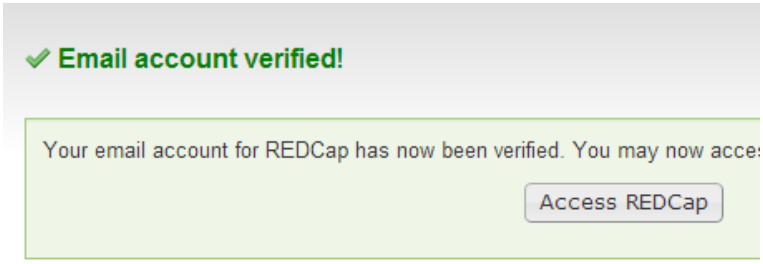
    b. No user information needs to be added here. User will be prompted to enter their details first time they login to REDCap.
3. Email the usernames (University of Melbourne domain name) to support team (support@grhanite.com.au), they will need to add the user to the REDCap system. Please mention which user should have the permission to create a project.
4. * Confirmation will be sent to person requesting account creation (yourself).
5. * Each user will also get confirmation email from REDCap with login URL.
6. Once user receives login URL:
    a. Users can use their University of Melbourne domain username & password to login
    b. Once they login they will prompted to enter basic information as shown below


Basic User Information Form
Before accessing REDCap, we first need to obtain some basic information ab
button. Once this information is saved, you can change it any time by navigatin
of every page.
Username:
bpatel
First name:
Bhargav
Last name:
Patel
Email:
bpatel@unimelb.edu.au
Re-enter email:
bpatel@unimelb.edu.au
NOTE: The email address entered above will fir
access to REDCap is granted. After clicking the
to that email account, after which you will need
verify your email account before accessing REI
Submit

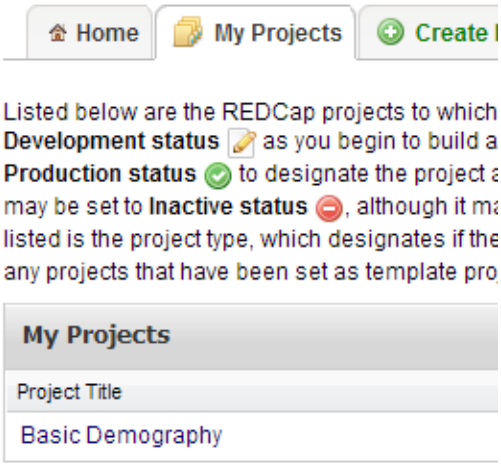
c. Upon submission of the basic details account verification email will be sent to user


Account created / Verification email sent
Your REDCap account has now been created. But to complete the account setup process,
email address by checking your email account bpatel@unimelb.edu.au for the account verif
REDCap, and follow its instructions. You will not be able to fully access your REDCap acc
has been completed. Thank you!
Check your email account bpatel@unimelb.edu.au

d. Once user verifies their account, they will be able to login to REDCap

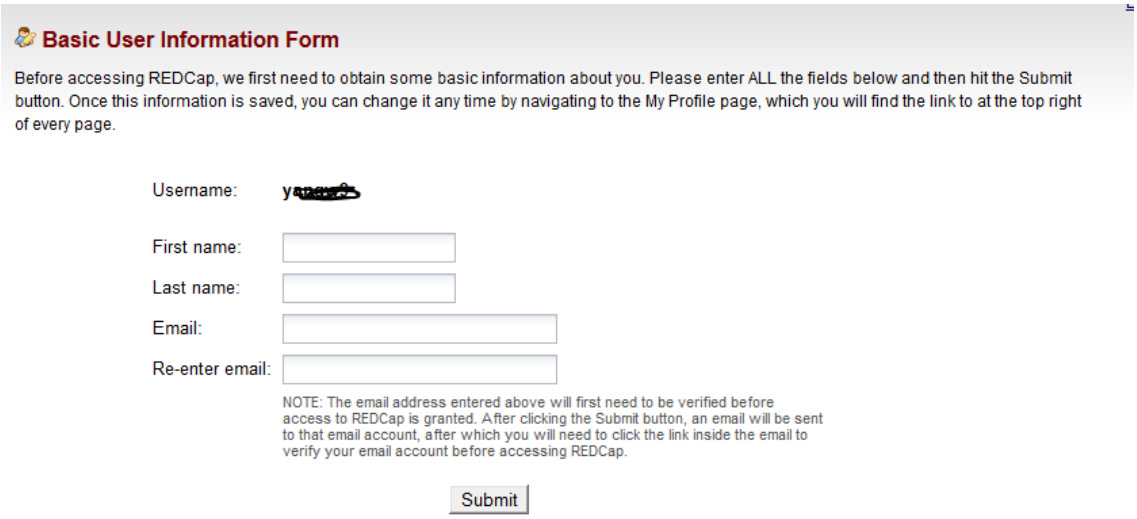


e. Projects will be visible under My Projects

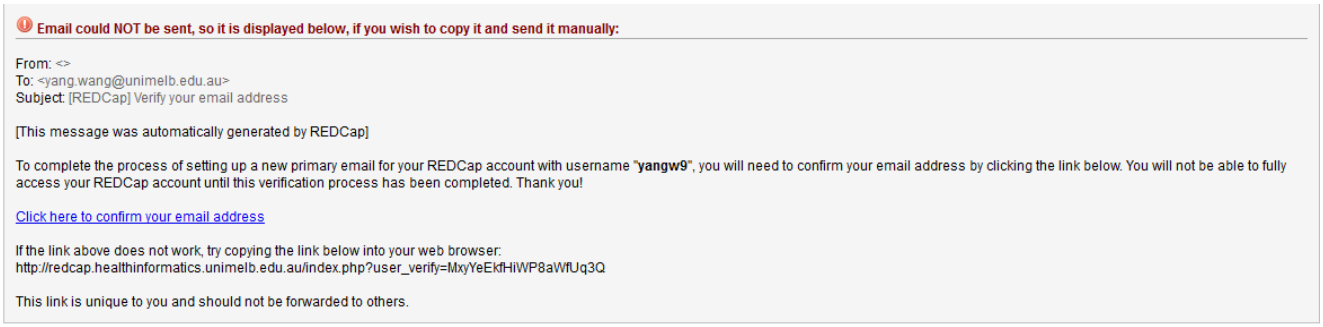

Home
My Projects
Create
Listed below are the REDCap projects to which
Development status as you begin to build a
Production status to designate the project a
may be set to Inactive status, although it ma
listed is the project type, which designates if the
any projects that have been set as template pro
My Projects
Project Title
Basic Demography

*** If step 5 haven't happened which the automatically confirmation email haven't been sent to the user**, please follow the below steps to verify the user email.

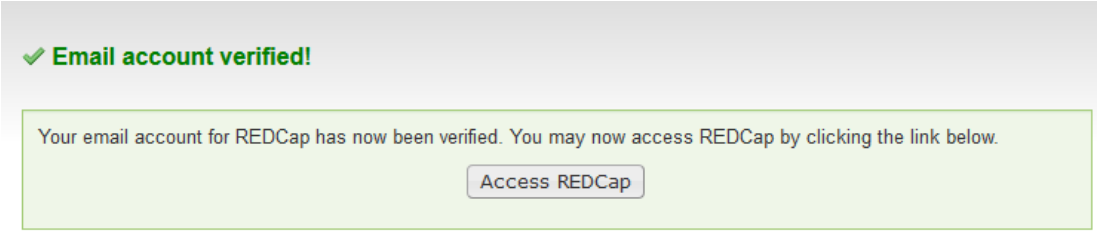
1. They could click the link 'https://redcap.healthinformatics.unimelb.edu.au/' and use their university user name and password to login. After click 'Log In', they will need to confirm their email address first like below.


Basic User Information Form
Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the My Profile page, which you will find the link to at the top right of every page.
Username:
First name:
Last name:
Email:
Re-enter email:
NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.
Submit

2. After clicking 'submit' in step 1, they need to click the link 'Click here to confirm your email address' in the web page like below screenshot.


Email could NOT be sent, so it is displayed below, if you wish to copy it and send it manually:
From: <>
To: <yang.wang@unimelb.edu.au>
Subject: [REDCap] Verify your email address
[This message was automatically generated by REDCap]
To complete the process of setting up a new primary email for your REDCap account with username "yangw9", you will need to confirm your email address by clicking the link below. You will not be able to fully access your REDCap account until this verification process has been completed. Thank you!
Click here to confirm your email address
If the link above does not work, try copying the link below into your web browser:
http://redcap.healthinformatics.unimelb.edu.au/index.php?user_verify=MxyYeEkfHiWP8aWfUq3Q
This link is unique to you and should not be forwarded to others.

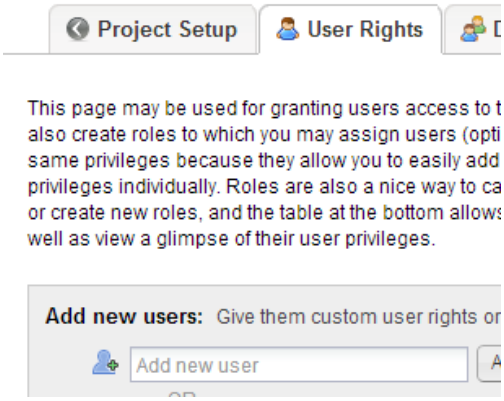
3. After clicking the link in step 2, they will get a confirmation page like below, then they could use Redcap.


Email account verified!
Your email account for REDCap has now been verified. You may now access REDCap by clicking the link below.
Access REDCap

Users without University of Melbourne domain email address

Follow the below steps in sequence.

1. If the user is totally new and no project is belonged to, please ignore the step 1, 2, 3.
2. Go to My Projects > User Rights
    a. Add usernames (DO NOT use full email ID here) to the project and assign appropriate permissions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privileges individually. Roles are also a nice way to ca
or create new roles, and the table at the bottom allows
well as view a glimpse of their user privileges.
Add new users: Give them custom user rights or
Add new user

3. No user information needs to be added here. This information needs to be added in below step.
4. Fill out 'UserImportTemplate.csv' with all users details and send email request to support@grhanite.com. Please mention whether the user should have the permission to create a project. Below is the link to the csv format import template.

UserImportTemplate.csv

Refer to

Appendix A (UserImportTemplate file data format) for information on UserImportTemplate.csv

5. Support staff will need to create the user in the REDCap system
    a. Username will be generated at this point, and confirmation email will be sent back to requesting person.
    b. Users will be sent REDCap URL to login along with temporary password

[This message was automatically generated by REDCap]

You have been given a login to access the following application:

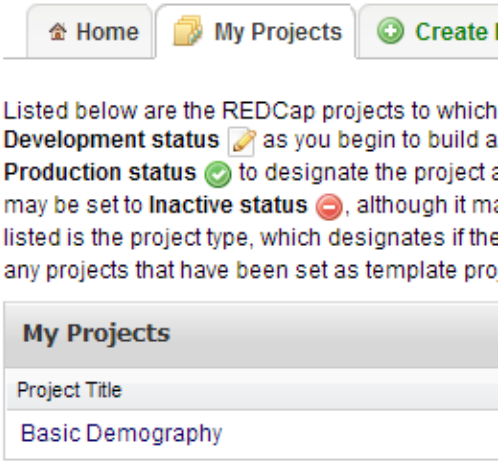
REDCap - http://redcap.healthinformatics.unimelb.edu.au/

Use the following information to log in:

Username: **bh**[redacted]
Password: [redacted]

You will be prompted to change your password the next time you log in.

6. Once user logins in to REDCap, projects will be visible under My Projects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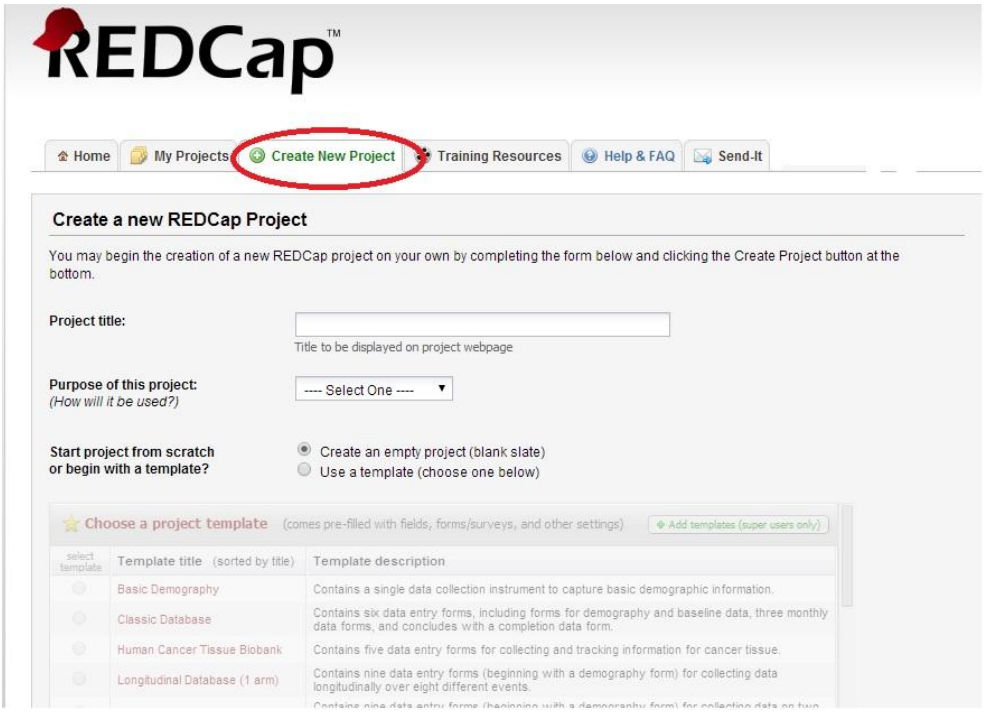
Production status to designate the project
may be set to Inactive status, although it ma
listed is the project type, which designates if the
any projects that have been set as template pro
My Projects
Project Title
Basic Demography

If the user is totally new and no project is belonged to, in this step, once user logins in to REDCap, they could create a project by clicking 'Create New Project'.


REDCap™
Home
My Projects
Create New Project
Training Resources
Help & FAQ
Send-It
Create a new REDCap Project
You may begin the creation of a new REDCap project on your own by completing the form below and clicking the Create Project button at the bottom.
Project title:
Title to be displayed on project webpage
Purpose of this project:
(How will it be used?)
---- Select One ----
Start project from scratch or begin with a template?
Create an empty project (blank slate)
Use a template (choose one below)
Choose a project template
(comes pre-filled with fields, forms/surveys, and other settings)
Add templates (super users only)
select template
Template title (sorted by title)
Template description
Basic Demography
Contains a single data collection instrument to capture basic demographic information.
Classic Database
Contains six data entry forms, including forms for demography and baseline data, three monthly data forms, and concludes with a completion data form.
Human Cancer Tissue Biobank
Contains five data entry forms for collecting and tracking information for cancer tissue.
Longitudinal Database (1 arm)
Contains nine data entry forms (beginning with a demography form) for collecting data longitudinally over eight different events.

Appendix A (UserImportTemplate file data format)

Username	First name	Last name	Email address	Institution ID	Sponsor username	Expiration	Comments

1. Username, First name, Last name, Email address are mandatory. Institution ID is better filled. **Leave other columns empty if no information is available.**
2. Username: the name to login; not the email address. It can only contain letters, numbers, underscores, hyphens and periods.
3. Email address: This is compulsory field as it is used to send account confirmation email.
4. Institution ID : The department name you come from
5. User's sponsor (secondary contact person): REDCap username of sponsor. A user's sponsor is the person to contact regarding this user account and may be the person who requested that this account be created.
6. Expiration: Time that the user's account will be automatically suspended. It should be in date time format such as '2017-03-20 16:00'. If don't know what to set, leave it blank. Incorrect date format will generate errors. User will be notified via email 14 days prior to their suspension, and if the user has a sponsor listed above, the sponsor will be CC'd on that email so that they are aware.